

NEW RESEARCH

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# Building Better B2B Customer Experiences



*insightly*

Research created in partnership with Ascend2

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# Survey Respondent Demographics

## Company Size

More than 500	14%
50 to 500	22%
Fewer than 50	64%

## Primary Role in Company

Owner / Partner / C-Level	51%
Vice President / Director /	35%
Non-Management Professional	14%

# Methodology

Ascend2 benchmarks the performance of marketing strategies, tactics and the technology that drives them with a standardized online questionnaire and a proprietary 3-Minute Survey format.

This survey was fielded to a panel of marketing professionals and marketing research subscribers.

# Building Better B2B Customer Experiences

Building customer relationships starts with creating an exceptional experience across all touchpoints of the customer journey.

But what does a successful customer experience look like for B2B organizations and how are marketers working to improve their strategies?

To help you answer this question, Ascend2 and Insightly fielded Building Better Customer Experiences Survey in October, 2022.

This report, titled *Building Better B2B Customer Experiences*, represents the opinions of the 111 marketing professionals responding to the survey who operate exclusively in the business-to-business (B2B) space.

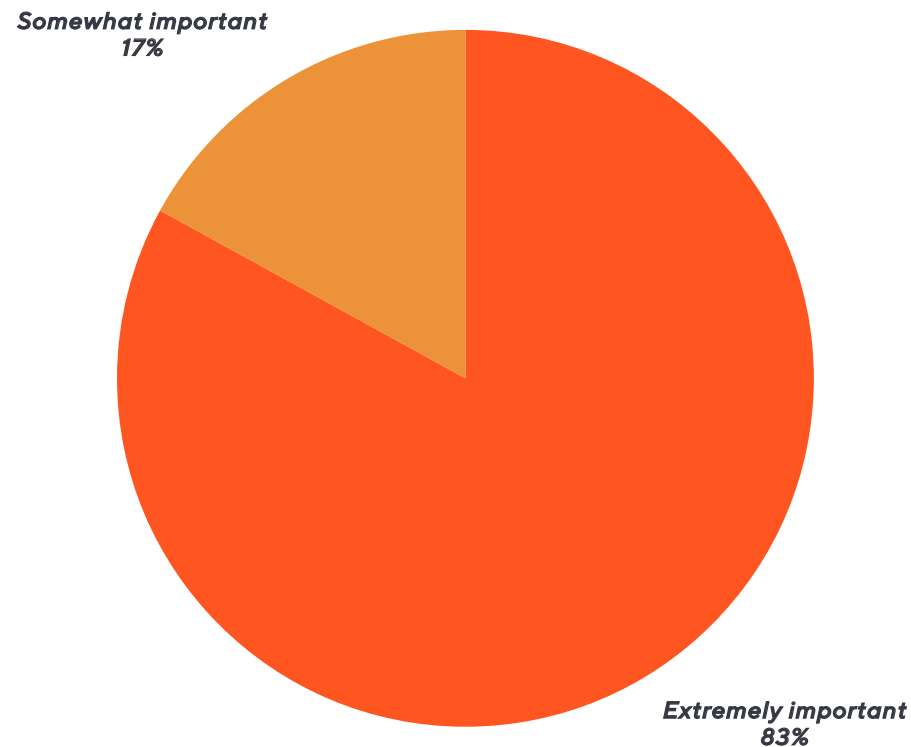
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# The Importance of Customer Experience

The customer experience has become a key differentiator for B2Bs and when executed successfully, gives organizations a strong competitive advantage. In fact, 100% of the B2B marketers surveyed agree that delivering an exceptional customer experience is important. 83% of B2B marketers that it is extremely important to success while another 17% of those surveyed say it is somewhat important.

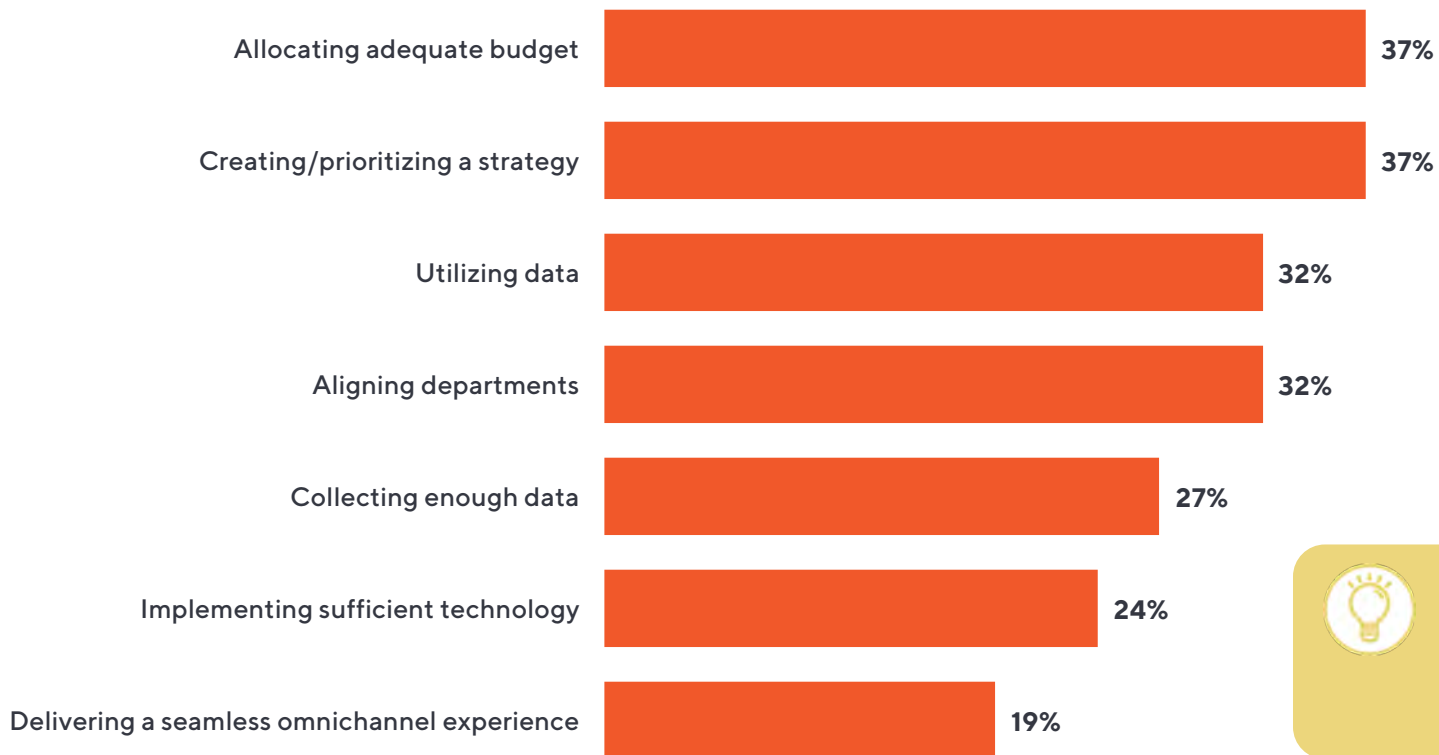
Rate the importance of delivering an exceptional customer experience.



# Greatest Challenges

Allocating enough budget and creating or prioritizing a strategy are reportedly the top two challenges that B2B marketers are up against as they work to improve the customer experience according to 37% of those surveyed. Utilizing data and aligning departments are not far behind with about one-third (32%) of B2B marketers reporting them as a top challenge.

## What are the greatest challenges of improving customer experience?

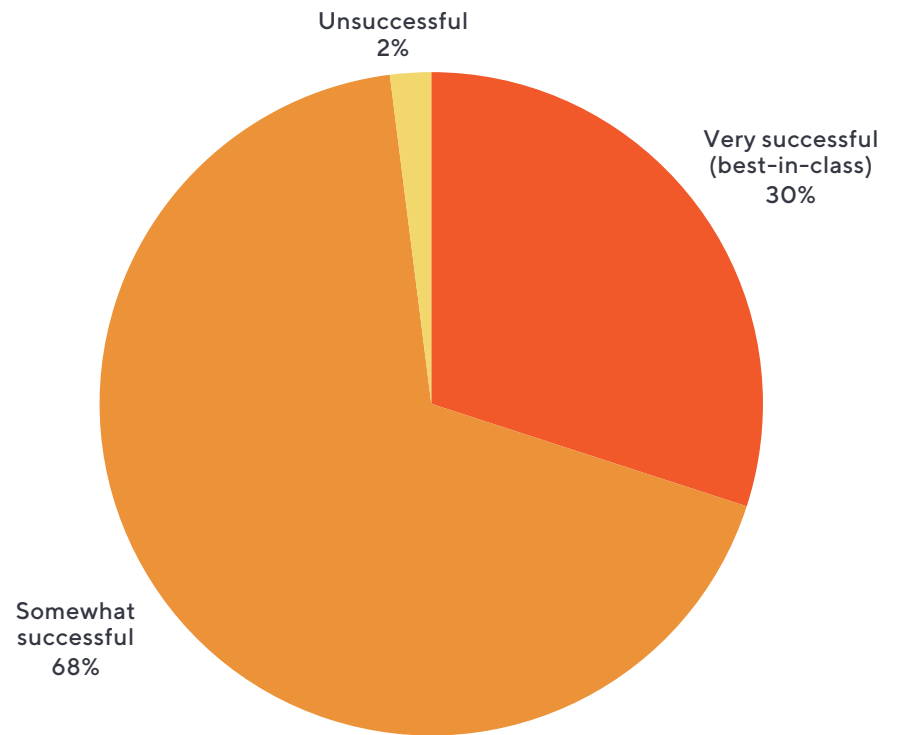


**Learn how  
choosing the  
right CRM can  
align teams.**

# Gauging Success

Marketers in the B2B space are realizing success as they try to improve the customer experience for their organization, but there is still significant room for improvement. While nearly one-third (30%) of those surveyed describe their strategy for bettering the experiences of their customer as “very successful” or best-in-class compared to the competition, over two-thirds (68%) say they have experienced just some success.

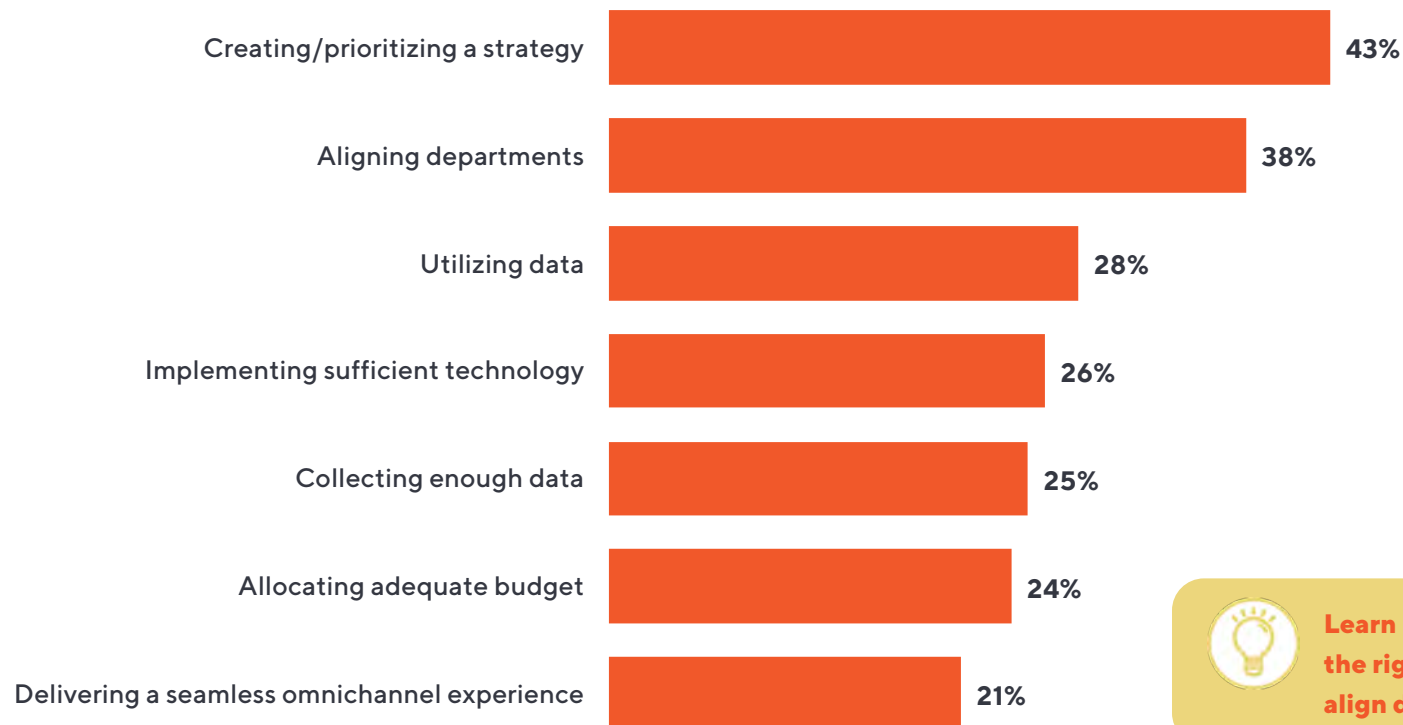
How would you rate the overall success of your strategy to improve customer experience?



# Top Priorities

While creating or prioritizing a strategy to improve customer experience is top of mind for B2B marketers in the coming year, aligning departments is also a high priority for 38% of those surveyed. Aligning departments and the technology they utilize helps to enable organizations to offer consistent and personalized customer experiences across all touchpoints of the customer journey.

What are your top priorities to improve the customer experience in the year ahead?



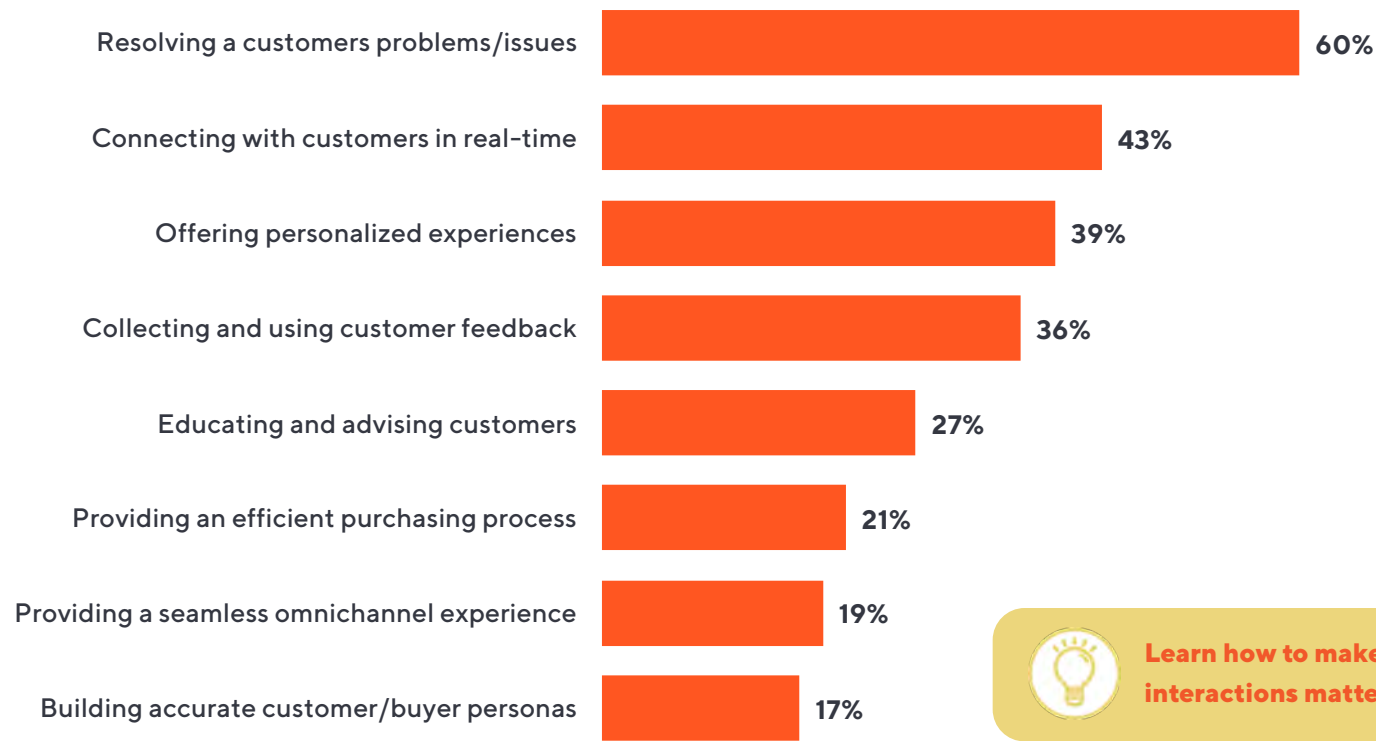
Learn how choosing the right CRM can align departments.



# Creating a Successful Strategy

Having the ability to resolve a customer's problems or issues is by far the most critical element contributing to a successful customer experience according to 60% of those surveyed. Connecting with customers in real-time and offering personalized experiences are also both important to achieving successful customer experiences according to 43% and 39% of B2B marketers surveyed.

## Which elements contribute most to providing a successful customer experience?



**Learn how to make customer interactions matter more.**

# Employee Enablement

To improve the customer experience, 37% of B2B marketers say that training and coaching as well as providing access to product or service knowledge are essential to success. Also at the top of this list is improving the overall employee experience and integrating technology for 36% and 35% of B2B marketers surveyed, respectively. All of these factors give employees what they need to deliver personalized, consistent, and exceptional experiences to their customers.

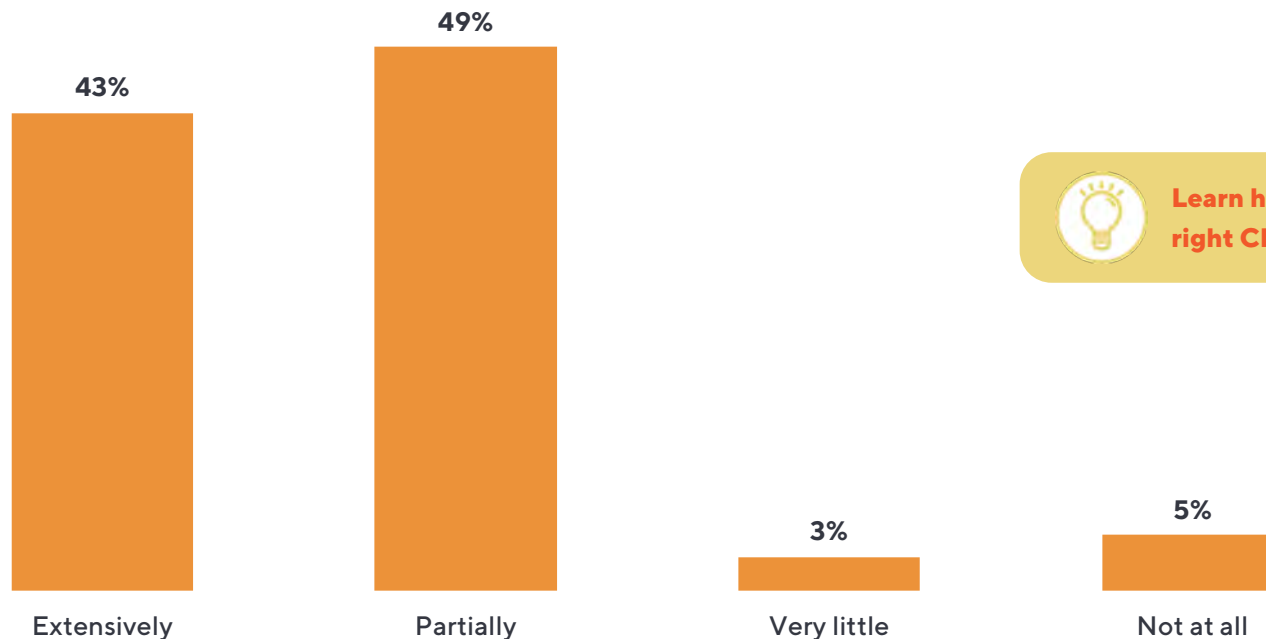
Which of the following are most important to enabling employees' ability to improve the customer experience?



# Information Sharing Across Teams

Aligning departments will be a top priority for B2B marketers in the year ahead, but what does information sharing across teams look like currently? 43% of those surveyed say that they have extensive sharing of information between adjacent teams such as marketing, sales, and operations departments. About half (49%) report having a partial ability to share information across teams. Information sharing can be critical to gaining important insight about customers and ultimately improving the customer experience.

Rank your organization's ability to use/share information across teams  
(marketing, sales, customer service, operations, etc).

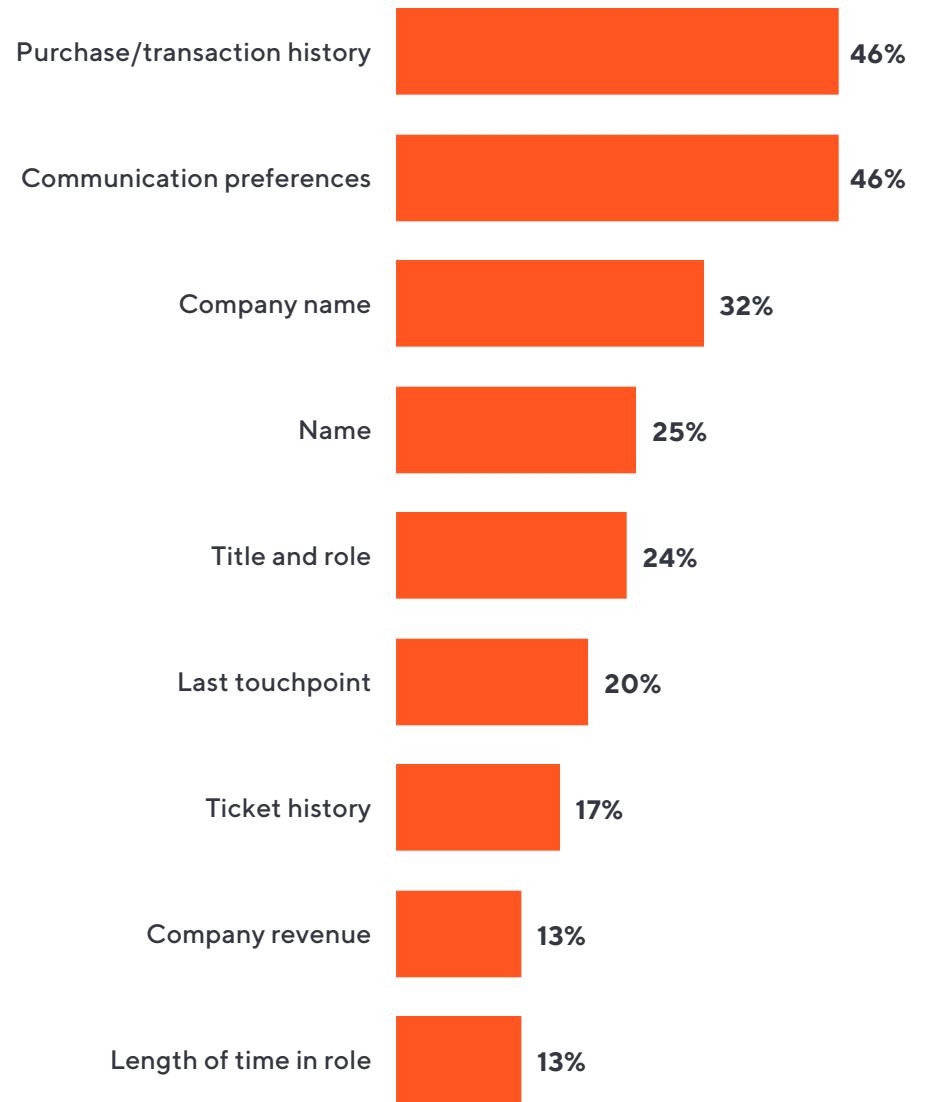


**Learn how choosing the right CRM can align teams.**

# Most Important Data to Know

According to B2B marketers, it is most important for the suppliers and vendors they work with to know their purchase or transaction history (46%), communication preferences (46%), and company name (32%) when it comes to how they experience working with other businesses. Interestingly, all of these data points were more commonly reported than the importance of knowing a person's name, which one-quarter (25%) of B2B marketers said is a most important item for suppliers or vendors to know about them.

## What data is most important for your suppliers/vendors to know and maintain about you?



# About the Research Partners



Insightly elevates the customer experience by aligning sales, marketing, and service in one platform. Built to deliver key customer insights across all teams, Insightly's unified CRM helps organizations sell smarter, grow faster, and build lasting customer relationships. Insightly is trusted by more than a million users worldwide.



Companies partner with Ascend2 to create original research, from survey conceptualization through report and content creation to media outreach. Ascend2 helps companies fuel marketing content, generate leads, and engage prospects to drive demand through the middle of the funnel.

[Learn more about Ascend2.](#)